Document Delivery Manual

NN/LM

National Network of
Libraries of Medicine
South Central Region

Revised June 2002

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Introduction

Ruicha Mishra
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In previous incarnations, the Document Delivery Manual for the South Central Region (SCR) was in a printed format. During the October 2000 meeting of the NN/LM SCR Document Delivery Committee, it was decided that with the rapidly changing technologies involved in document delivery and issues raised by these technologies, the manual would be better maintained and revised if it was Web-based. Committee members suggested the topics included in the manual, and the authors are either past or current members of the committee or librarians interested in document delivery issues.

I would like to thank all the authors for their contributions to this project. The creation and revision of this manual is only possible through their dedicated work.

Librarians in the SCR are encouraged to contribute information or suggestions for additions to the Manual by contacting Re Mishra, NN/LM SCR Education-Communications Coordinator.

Borrowing

Requests for library materials not located in a library's collection should be considered as possible "interlibrary loan" requests. The term "interlibrary loan" is somewhat a misnomer today because the vast majority of requests between health science libraries are for copies of a book chapter or journal article, rather than for borrowing the items. Audiovisuals, computer software, and even "original" materials, i.e., books, may not circulate due to licensing restrictions or heavy usage in the lending library.

Resource sharing between libraries is a vital service between all types of libraries. Health science libraries have a mission to provide essential information support for health professionals and students in the health professions. This support ultimately translates to the dissemination of the latest technological and research results to health practitioners in providing high quality patient care. Interlibrary loan is a means to meet the informational needs of users when the local collection cannot.

The borrowing process begins with a request from a patron for an item. The item may be a bibliographic citation from a literature search, or a reference at the end of another article. Any request should include the complete bibliographic information and be verified as complete and accurate.

Borrowing Etiquette

Interlibrary loan services is a reciprocal relationship with each library willing to supply materials as freely as they request them. Requesting libraries' responsibilities include:

- Acknowledging policies and procedures of the lending libraries, including honoring due dates, shipping policies, and other restrictions set by the lender
- Paying any charges incurred and invoiced by the lending library
- Attempting to verify the correctness of the citation or reference for that material before transmitting it to the lender
- Distributing requests evenly among holding libraries as to not overburden a small number of libraries with too many requests
- Transmitting requests that comply with standards of the Medical Library Association, National Library of Medicine, American Library Association or other authorized agency
- Complying with the U.S. copyright law and its guidelines, including all record keeping, paying royalty fees, and signage requirements

Verification

Verification is the process of checking the accuracy of each element of the citation in an authoritative index. If verification cannot be located, a source of the reference should be noted on the request. Most verification tools are produced in both print and electronic format.

Some databases for journal article verification (electronic):

- PubMed - MEDLINE database produced by the National Library of Medicine; contains "single citation matcher" for verification of journal articles
- CINAHL - Cumulative Index to Nursing & Allied Health Literature produced by CINAHL Information Systems.
- HealthStar - produced by the National Library of Medicine and the American Hospital Association

Some databases for book/audiovisual verification:

- LOCATORplus
- OCLC
- Books in Print

Methods of Interlibrary Loan Requests

The most common method in health sciences libraries is via DOCLINE. Other methods include:

- OCLC
- ALA printed form
- Telephone, fax or written request

Source/Additional Information

Interlibrary Loan Fact Sheet. NLM.
http://www.nlm.nih.gov/pubs/factsheets/ill.html

National Interlibrary Loan Code for the United States. ALA.
http://www.ala.org/rusa/stnd_lnc.html
Prepared by the Interlibrary Loan Committee, Reference and User Services Association, 1994, revised 2001. Approved by the RUSA Board of Directors January 2001.

Interlibrary Loan Form. ALA.
http://www.ala.org/rusa/stnd_illformprint.html
Commonly known as the ALA form. Available in Word 6 or .pdf.

Lending

To make Interlibrary Loan (ILL) function optimally, libraries must be willing to share their resources. If you borrow, you should be willing to lend. To avoid unduly overburdening libraries with larger collections with too many requests, libraries of all collection sizes must be willing to share.

Interlibrary Loan Policies and Procedures

Each library should have a written ILL policy and it should be available to any borrowing library. A library can establish its own policies, but the following items need to be addressed:

- Receiving Requests:
  - How will you accept requests? Via DOCLINE? Via OCLC? Via fax? Via ALA forms?
  - How often will you check for incoming requests?
- Filling Requests:
  - How are you willing to fill requests? Mail? Fax? Ariel? E-mail?
  - What are you willing to lend? Photocopies? Books? Audiovisuals?
  - Do some items not circulate? What is the loan period? Is renewal possible?
  - What will be your normal processing time for filling or rejecting requests?
- Charges:
  - Will you charge to fill requests? Will you only charge for certain types of requests, i.e. fax or rush requests? Will you enter into reciprocal lending agreements with other libraries?
  - If you choose to charge for filling requests, how will you bill the requesting library? What methods of payment will you accept?
  - What are the charges for overdue items?

Processing a Request

Each request that is received should be evaluated before it is filled or rejected. If a request can be filled, it should be filled. Once a request is received, it should be processed as soon as possible. All loans should have a copy of the request form attached to the loan. It is also recommended that all originals be insured, in case of loss or damage by the delivery service. All monographs, audiovisuals and software should be properly packaged with specific instructions for returning items to the borrowing library.

A request should only be rejected if:

- Borrowing library is not willing to pay the amount you charge for a loan
- Request does not indicate copyright compliance
- Method of delivery requested is outside your stated policy
- Item requested is outside your stated policy

- Bibliographic citation is incorrect and the correct citation cannot be verified
- Borrowing library has previously violated your stated policy, e.g the library has defaulted on an invoice or has not returned an item

If a request must be rejected, it should be done in a timely manner and should state the rejection reason.

Managing Lending Files

Although not required by law, libraries should maintain a file of requests they have received. This information can be useful for tracking disputed invoices, assisting in collection development, and establishing lending patterns. It is usually recommended that three years plus the current year's worth of data be kept.

Libraries vary in how they maintain these files. Some organize actual printed copies of the requests. Others use Interlibrary Loan management software to electronically maintain the data.

Source/Additional Information

National Interlibrary Loan Code for the United States. ALA.
http://www.ala.org/rusa/stnd_lnc.html
Prepared by the Interlibrary Loan Committee, Reference and User Services Association, 1994, revised 2001. Approved by the RUSA Board of Directors January 2001.

Interlibrary Loan Standards and Codes

There are many guidelines, standards, and codes that govern Interlibrary Loan services in the United States, Canada, and internationally. The following links provide access to some of these guidelines, standards, and codes. The focus has been on United States policies, but there are also some links to relevant documents for international interlibrary loans.

Guidelines from the American Library Association (ALA)

Interlibrary Loan Code for the United States. 2001.
http://www.ala.org/rusa/stnd_Inc.html
Prepared by the Interlibrary Loan Committee, Reference and User Services Association, 1994, revised 2001. Approved by the RUSA Board of Directors January 2001.

Interlibrary Loan Code for the United States Explanatory Supplement. 2001.
http://www.ala.org/rusa/stnd_ill_supp.html

> The Code itself is a fairly short document which was approved by the Reference and User Services Association (RUSA) Board of Directors of the American Library Association (ALA). It states that Interlibrary Loan is an important component of resource sharing and quality service to patrons in the current library environment. Interlibrary Loan provides a way for libraries to better fill their patrons' information needs when specific resources are not owned locally. In order to be effective as a national resource sharing system, many types and sizes of libraries need to participate in this nationwide interlibrary process of borrowing and lending. For those familiar with the 1994 Code, this new version of the ILL Code (2001) incorporates guidelines for electronic features that have become more and more standard in Interlibrary Loan practices in the last few years.

> The Code, while necessarily broad in scope, provides principles, guidelines, and responsibilities for those libraries that participate in interlibrary borrowing and lending. It outlines the basic standards with which all interlibrary loan transactions between libraries in the United States should comply. In a series of short statements, each only one or two sentences, the Code outlines the definition of Interlibrary Loan, its purpose and scope, and states the basic responsibilities both of the library that wishes to borrow materials (the "requesting" library) and the library that is willing to lend items (the "supplying" library.) It should be noted that the requesting library must be familiar and in compliance with U.S. Copyright Law and its guidelines. The Code also provides a link to a copy of the American Library Association's Interlibrary Loan request form ("the ALA Form") that can be printed and used by requesting libraries if necessary.

Please note that a clickable link to an "Explanatory Supplement" to the Code is provided at the end of the Code (http://www.ala.org/rusa/stnd_ill_supp.html). Although this document is longer than the Code itself, it provides detailed explanations, background material, and examples of specific sections of the Code, which are well worth reading. The accompanying footnotes to

the "Explanatory Supplement" lead the reader to excellent resources that cover more specific guidelines and procedures for both national and international policies.

Guidelines and Procedures for Telefacsimile and Electronic Delivery of Interlibrary Loan Requests and Materials. Reference and Adult Services Division. 1994.
http://www.ala.org/rusa/stnd_telefax.html

> This document covers guidelines that requesting and supplying libraries should follow when transmitting Interlibrary Loan requests and supplying Interlibrary Loan documents by FAX or other electronic means such as ARIEL. Please note that the document states that libraries should be familiar with the ILL Code from ALA (see above), copyright law, and CONTU standards (from the National Commission on New Technological Uses of Copyrighted Works), as well as state, regional, network, and consortium guidelines. This document provides guidelines that apply in the absence of state, regional, network, and consortium guidelines. In other words, systems such as DOCLINE and OCLC have their own accepted standards and procedures which should be followed if the library participates in one or more of these systems. If a library does not participate in systems such as these, or a situation arises that their guidelines do not address, the ALA guidelines may provide guidance in that situation.

> The purposes of the guidelines are to establish uniform standards for the types and uses of equipment used for transmitting ILL requests and documents by FAX or other electronic means, uniform standards for the formatting of requests by the borrowing library, and uniform standards for responses by the supplying library. Again, libraries should follow the standards of the bibliographic utilities that they use (such as DOCLINE and OCLC) when possible, or use these guidelines for instances outside the utilities' domain. These guidelines include such notes as preferred method of delivery, the appropriate ways to contact libraries electronically, the appropriate use of "rush" requests, how quickly requests should be responded to, and whether libraries should charge extra fees for documents filled electronically.

Guidelines for the Interlibrary Loan of Audiovisual Formats. Final Draft 1998.
http://www.ala.org/vrt/illguide.html

> While the general guidelines of the Interlibrary Loan Code for the United States apply to audiovisual materials, the ALA felt that these special materials needed some additional explanation, and therefore these guidelines were created.

Interlibrary Loan Packaging and Wrapping Guidelines. Reference and User Services Association. 1997.
http://www.ala.org/rusa/stnd_illpack.html

Guidelines for Packaging and Shipping Microforms. 1989.
http://www.ala.org/alcts/publications/guidelines/packaging.html
Guidelines from the Association of College and Research Libraries (ARL)

Guidelines for the Loan of Rare and Unique Materials.
http://www.ala.org/acrl/guides/loanrare.html

Guidelines on Shipping Interlibrary Loan Materials from the U.S. to Canada

Transborder Interlibrary Loan from the U.S. to Canada. ARL with Assistance from the National Library of Canada. 1999.
ftp://www.arl.org/ill.trans

Guidelines on International Interlibrary Borrowing, International Federation of Library Associations (IFLA)

International Lending: Principles and Guidelines for Procedure. 2001.
http://www.ifla.org/VI/2/p3/ildd.htm

IFLA Fax Guidelines. 1995.
http://www.ifla.org/VI/2/p3/g-fax.htm

IFLA Guidelines for Sending ILL Requests by Email. 2000.
http://www.IFLA.org/VI/2/p3/g-ill.htm

The DOCLINE System

DOCLINE development began in 1976 at the NLM as part of an effort to facilitate interlibrary loans. DOCLINE provided automated routing of requests based on a national database of serial holdings and eliminated the need to enter detailed journal citations by linking the system to MEDLARS. When the system went live on March 15, 1985, the time between placing a request for a document and its delivery was significantly decreased. DOCLINE now serves over 3,000 U.S. and Canadian medical libraries.

DOCLINE's three main parts are DOCUSER, SERHOLD, and REQUESTS. DOCUSER contains information on DOCLINE's users: addresses, contact information, interlibrary loan services, NN/LM membership, and routing tables. SERHOLD is the database of journal holdings for institutions on which DOCLINE bases its request routing; institutions may update their holdings as they change. REQUESTS provides access to the borrowing and lending functions of DOCLINE and allows users to check the status of or cancel requests.

For information on using DOCLINE, visit these Web sites:

DOCLINE Frequently Asked Questions. NLM.
http://www.nlm.nih.gov/services/faqdocline.html

DOCLINE Online Manual - Table of Contents. NLM.
http://www.nlm.nih.gov/docline/docline_manual/docline_manual_toc.html

Tutorial for DOCLINE on the Web. NN/LM.
http://train/tutor/docline/

DOCLINE Survival Links. NN/LM.
http://libinfo/docline/

DOCLINE Fact Sheet. NLM.
http://www.nlm.nih.gov/pubs/factsheets/docline.html

Planning a Routing Table

The Routing Table is an integral part of the DOCLINE program. When a request is entered, the Routing Table is used to automatically route the request to a holding library. (Library holdings are found in SERHOLD.) Every library in the DOCLINE program decides which libraries are included in their routing table profile and in what order. The routing table consists of nine cells, each of which will hold up to 20 libraries. It is located in the Interlibrary Loan section of your DOCUSER record. The main goal of your routing table is to balance borrow/lend ratios between libraries whenever possible.

Planning a routing table is a logical process. First, assemble a list of libraries that are currently being used or that should be used. Divide these libraries into categories:

- **Libraries that charge and libraries that do not**
    - Place free libraries in the first cells of the table and charging ones in the last cells.
    - Additionally, libraries that charge less, e.g. $4, should be placed before libraries that charge more, e.g. $9.
    - Consider adding "Reciprocal Libraries." Borrowing from these libraries will be reciprocally free to other libraries.
- **Large libraries and small ones**
  Put smaller libraries first so they can participate in lending.
- **Libraries that offer a preferred delivery method and ones that do not**
  Put libraries that use fax or Ariel as their primary delivery method early in the table, if that is desired.
- **Special collections**
  If special collections are needed on a regular basis, find libraries that meet these needs and add them to your table.
- **Regional Medical Library (RML)**
  The RML (Houston Academy of Medicine-Texas Medical Center Library, LIBID: TXUTEX) is placed in the final library-specified cell (cell 9) for all Primary Access Libraries. Resource Libraries are free to put the RML in any of their cells.

Remember: It's good practice to ask before adding an out-of-region library. The SCR allows any library to put any other library in the region in its routing table without prior permission.

Review the routing table at least annually. Libraries that are included may need to be moved up or down in the table according to volume of usage.

DOCLINE ILL Interfaces Summary

Interfaces:

Summary
Clio Version 2.0
OCLC ILLiad Resource Sharing Management Software
QuickDOC for Windows, CD4Win
Relais V3
RLG's ILL Manager V1.1

Summary

Five DOCLINE ILL interface products are presented: Clio, OCLC ILLiad, QuickDOC For Windows, RLG's ILL Manager, and Relais Enterprise. There is a brief description of each product, cost, system requirements, and contact information on the following pages. (Choose a specific link above or select the right arrow at the end of this article.) Since these products and interlibrary loan options are changing rapidly, for the most current information go to the Web site link at the end of each product's description.

Interlibrary loan continues to be a focus for product development by library vendors. Most vendors are now offering a more complete ILL package that encompasses all phases of the ILL process, including scanning and managing electronic documents or desktop delivery. Emphasis is placed on patron involvement, taking some of the work away from ILL staff. Most ILL products support electronic requesting, status self-check, and electronic receipt of documents. More delivery methods are available: Ariel, e-mail TIFF or PDF, and Email Post-to-Web. This makes it easier for patrons, such as distance learning students, to receive electronic documents. On the lending side, the speed and ease of electronic delivery of documents, plus the efficiency of routing tables and electronic payment have all made inter-regional borrowing more commonplace.

The key to product integration is the ISO ILL - International Organization for Standardization - protocol for interlibrary loan, or ISO 10160/61. ISO ILL compliance allows systems interoperability and the ability to communicate. The interface products have finished testing and are awaiting DOCLINE to begin production use of its ISO ILL gateway. Once DOCLINE is ISO ILL compliant, information will transfer automatically without staff intervention, such as copy and paste.

IPIG - ILL Protocol Implementors Group - is an international group of vendors and service providers who are working together to implement the ISO ILL. Without agreement by members on issues, interoperability would not be possible. IPIG members voted to make e-mail the mandatory transport mechanism for protocol messaging.

In the future, NISO CIP, Circulation Interchange Protocol, will allow library circulation systems to communicate directly with one another via messages sent on the Internet, regardless of platform or vendor. NISO CIP will make possible:

- Interlibrary loan and circulation interaction within a library
- Patron authentication
- Patron self-service circulation
- Direct consortium or reciprocal borrowing for patrons. Library users will be able to borrow interlibrary loans across library systems.

For more information see: *Information Today* 18(3):48, Mar 2001.

ILL Interfaces:
Clio

Clio 3.0 was released in November, 2001 and is now compatible with DOCLINE. It is comprised of three modules: Clio, ClioRequest, and ClioAutoUpdater. Clio 3.0 is the heart of Clio Software and it manages the ILL operation.

ClioRequest is an automated interface for both borrowing and lending. ClioRequest has had a totally integrated method of submitting requests to OCLC through Direct Request. Microenhancer files are used to receive new messages and transmit updates back to OCLC. ClioRequest has expanded capabilities that include routing new borrows to DOCLINE or a variety of other destinations. ClioRequest will send a patron initiated request to OCLC or DOCLINE and borrows can be routed automatically or with staff assistance. Clio interfaces with DOCLINE through an embedded Web browser. DOCLINE lend requests must be copied and pasted into Clio, and there they integrate with lends from other sources. ClioRequest will manage all requests in one database and handles all searching, reporting, and copyright tracking. Billing can be through IFM, invoicing, and deposit accounts. EFTS through Clio is in the final stages of completion and should be available shortly.

ClioAutoUpdater automatically updates the status of both outgoing and incoming requests transmitted through Ariel. It can convert files to PDF format and copy them to a server for ClioWeb users. The lending requests are updated to "YesCopy" and sent to OCLC through the Microenhancer. Borrowing requests are updated to "ReceivedCopy" in Clio and an e-mail message is sent to the patron if you choose that option. The number of pages is noted for automatic copyright tracking. Once you receive a "Shipped" message, ClioAutoUpdater will send the message to OCLC.
A lend function allows all new requests, regardless of origin, to be checked against local holdings. Clio works with most OPACs including: Endeavor Voyager, III, DRA(Web2), SIRSI, and VTLS. A pick slip is generated with the ILL number in barcode form.

Two Clio modules are optional and an extra charge: ClioWeb and ClioDoc.

ClioWeb allows patrons to check the status of their ILL requests from a password or ID protected Web page. Patrons use any standard Web browser or any Internet connection. Patrons submit requests that then can be routed to OCLC and received through desktop delivery. ClioWeb easily integrates into a library's existing Web site and can be customized. ClioWeb uses Allaire's ColdFusion technology.

ClioDoc is designed for distance learning patrons or document delivery to local library patrons. With ClioDoc Web page e-mail requests are automatically loaded into the database. Patron billing and statistical reports can be generated. With ClioDoc, patrons can request on the Internet, but electronic delivery of photocopies is being developed with Version 2 of ClioDoc.

Features

- Bookstraps and mailing labels
- Barcode number entry
- Designed to easily integrate with library Web site
- Online manuals

Cost

Clio 3.0 is priced on a sliding scale according to the number of ILL transactions processed in the previous year. Clio 3.0 may be installed on an unlimited number of workstations at one site. This is a one-time fee, not a yearly subscription. No installation fee or maintenance fee required. (Clio 3.0 includes ClioRequest and ClioAutoUpdater)

Less than 5,000	$500
5,000 - 10,000	$1,000
10,000 - 20,000	$2,000
More than 20,000	$3,000

ClioWeb costs an additional $1,000. UNIX servers require a separate purchase of Cold Fusion.

ClioDoc costs an additional $1,000. It requires Access 2000.

All upgrades and technical support are supplied free for at least one year.

System Requirements

Microsoft Access 2000, Pentium CPU, 24MB of memory (32MB recommended), SVGA monitor (800x600), Windows95, 98, 2000 or Windows NT

Contact

Clio Software
114 Bedford Road
New Boston, NH 03070
Phone: 603-487-2391
Fax: 603-487-2833
E-mail: info@cliosoftware.com
Web: http://www.cliosoftware.com/

This company, formerly know as Perkins & Associates, was founded by Dorothy and Larry Perkins. Clio Software is seven years old and has more than 800 customers. Clio is committed to the development of software solutions for ILL.

ILL Interfaces:
OCLC ILLiad Resource Sharing Management Software

In July 2000, OCLC signed an agreement with Virginia Tech Intellectual Properties, Inc. and Atlas Systems, Inc. to license and distribute ILLiad software. OCLC ILLiad is now fully ISO ILL compliant. This enables request submission via OCLC, RLIN, DOCLINE via the Web, e-mail, and ISO ILL. All borrowing, lending, and document delivery are handled through a single, Windows-based interface.

ILLiad was originally designed to manage OCLC borrowing requests at Virginia Tech University Library. Later, lending functionality was added. Atlas Systems, Inc. provides support and development for the OCLC ILLiad software. OCLC ILLiad is now developing a Z39.50 module to search OPACs and a seamless interface to OCLC ILL that will not require Passport software.

Borrow

OCLC ILLiad provides a highly customizable, Web-based, end user interface. Patron accounts are set up and saved in library-required fields. Requests are made and tracked 24 hours a day on the Web from anywhere by the patron. OCLC ILLiad supports user-initiated requests from OCLC FirstSearch, OVID, and SIRSI. Patrons are e-mailed with notification of received items and with messages of an item's status. Patrons can renew items and view their ILL request history.

OCLC ILLiad manages electronic delivery of Ariel documents. Documents can be reviewed and kept on a server and patrons can view or print their documents. The software monitors copyright usage and provides a method to make payments for royalties. A Document Delivery module allows a library to supply material from its own collection.

Lend

OCLC ILLiad imports OCLC, RLIN, and DOCLINE records with text from the full record on the lending search screen. It can check most major library OPACs. With OCLC, the Microenhancer automatically downloads and batch processes data. With DOCLINE, requests must be copied and pasted into ILLiad and also, when completed, from ILLiad to DOCLINE to update. Data is parsed into each correct corresponding ILLiad field. A telnet link is used to search for the record. Requests are marked as Ariel, if an Ariel address is located, or are they placed into a rush queue. OCLC ILLiad generates invoices and tracks billing, including IFM, and it is capable of transmitting DOCLINE transactions to Electronic Fund Transfer system (EFTS).

Features

- Highly customizable screens can be made to look like a library's Web page
- Windows-based interface
- Client/Server setup minimal on client machines
· Detailed reports of borrow and lend statistics, including graphs
- Prints bookstraps, address labels, and barcoded labels

Cost

Prices based on total number of ILL requests (borrows) per year. Pricing is for one institution/ one physical site. The fee includes software license fee, all updates to software, and support for the software. The cost is an annual fee.

ILLs/year	0-1,500	1,501-10,000	10,001 & greater	Fee/Satellite Site
Member	$3,500	$4,000	$5,000	$1,000
Non-member	$4,500	$5,000	$6,000	$1,200

Installation Fee per site: $1,200 (a one time charge)

System Requirements

Server Hardware:

Intel Pentium III, 600MHz or greater processor, 256MB RAM minimum, 1 GB hard drive recommended, Ethernet connectivity, backup device recommended, Windows NT Server 4.0, including Internet Information Server 3.0 or Windows 2000 Server, including Internet Information Server 5.0

Client Hardware:

Pentium II 350, 6 MB RAM minimum, 2GB hard drive minimum, Ethernet connectivity, printer capable of handling removable labels minimum (color printer recommended)

Client Software:

Windows 98, Windows NT workstation 4.0 or greater, Windows 2000 or Windows XP; Microsoft Word 97/2000; OCLC Passport for Windows, OCLC ILL Microenhancer for Windows; Adobe Acrobat 4.0 or higher; Internet Explorer 4.0 or higher

Contact

Licensing contacts:

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Virginia Tech Intellectual Properties, Inc. (VTIP) works to identify, develop, protect, and market discoveries resulting from research by Virginia Tech faculty, staff, and students. ILLiad was created in the Interlibrary Loan office at Virginia Tech, and the Borrowing module is licensed through VTIP.

Atlas Systems, Inc. provides service and support for the ILLiad system, as well as licensing the Lending module. Founded in 1996, Atlas Systems, Inc. also provides computer hardware and software consulting services.

ILL Interfaces:
QuickDOC for Windows, QD4Win

Like the original DOS version of QuickDOC, QuickDOC For Windows (QD4Win) is designed to interface specifically with DOCLINE. The goal of QD4Win is to handle tasks that DOCLINE does not, such as report writing and billing. QD4Win is a product that is under construction and, according to Jay Daly, the creator and programmer, it will always be a "work in progress" as it continues to adapt to changes in technology.

Stage One of QD4Win is the QDPortal Program. The Portal automatically logs the user into DOCLINE each time the program starts. The Portal saves DOCLINE borrow, lend and Loansome Doc transactions automatically in text files, using Access 2000. QDPortal requires Internet Explorer and version 5.01 is recommended.

QDLend is Stage Two and was introduced as an interim file in November 2000. It works with QDPortal and allows searching and editing lend records. All receipts that are accepted and updated using QDPortal are logged into QDLend. There are several lend grids:

- Search All Lend grid - displays all items lent. Lends can be searched by item number or by LIBID and limited by date. Items can be edited in this grid.
- Items Received grid - lists current items not yet acted upon.
- Items Filled grid - lists transactions that have been completed.
- Drop down boxes and calendar controls in most of the columns.

QDLend includes Patron Files, Lend Records, and a Library List imported from Old QuickDOC files. Each library record has default settings such as LIBID, EFTS, and default charge. Libraries can be edited or added. The Add New Items form is used for adding non-DOCLINE lends. QDLend has billing capability either by EFTS or invoice. EFTS uploads manually through FTP or e-mail.

QDBorrow is in the beta testing stage. It will import borrow records from Old QuickDOC and join QDBorrow with QDLend files.

QD4Win Reports include:

- Detailed Lend Report by library - all items subtotaled
- Summary Lend Report by library - one line per borrower
- Multiple copies of reports printed by any date range
- Data exported in comma-delimited format to Access 97 or greater, or to Excel

Future Enhancements

- QDLend will be replaced with QuickDOC and include both lending and borrowing files.

- A fully functional EFTS and billing and record keeping module will be available with QD4Win 2.0 and EFTS files will upload automatically.
- Borrowing records will be imported from Old QD and updated.
- QD4Win will support the ISO ILL protocol and will require MIME-compliant email or an optional direct TCP/IP connection on port 499 for messaging.
- Patron generated features.

Cost

QuickDOC For Windows, New User $299.95
QuickDOC For Windows, Upgrade (DOS Subscriber) $125.00
Annual Update Subscription, 2000-2001 .... $59.95
(Annual update includes telephone and e-mail help, access to the QuickDOC-L Listserv and Web site along with free download upgrades to new versions posted during the year.)

System Requirements

Hardware:

Pentium or better processor, Windows 95, 98, 2000, or NT 4.0, 32MB RAM (64 or higher recommended), Intenet access

Software:

QuickDOC

Contact

Jay Daly
45A Mason Terrace
Brookline, MA 02446
Phone: 617-734-0918
Fax: 617-734-3154
E-mail: jay@caregroup.harvard.edu
Web: http://nnlm.gov/~quickdoc/

Jay Daly is the producer and sole distributor of the QuickDOC product.

ILL Interfaces:
Relais V3

Relais V3 has two interdependent products: Relais Enterprise 3.0 and Relais Express 3.2 Software and Scanning Workstation.

Relais Enterprise 3.0 is an interface product that can accommodate the needs of a wide variety of ILL departments and Document Delivery operations. It is designed for large library operations or an institution with multiple branches or campuses. Enterprise is a modular system, and its components can be used separately or as one. Requests can be sent to remote workstations in other departments or to sites for scanning and processing. The Relais products emphasize time savers for staff by providing automatic updates and data input. The National Library of Medicine has used Relais to process their interlibrary loans since 1998.

Relais Express 3.2 software and Relais Scanning Workstation have been upgraded with more electronic document delivery features. Relais Express manages delivery to libraries and patrons. Delivery methods include: Ariel, fax, e-mail attachment PDF or TIFF, e-mail Post-to-Web PDF, or print. If electronic delivery is indicated, Relais sends the requests from the scanner to a server. All requests are automatically updated when completed. Relais isolates problem requests, and only those that are not successfully completed need staff intervention. Relais Express supports color scanning and delivery. Requests can be searched by patron, lending library, date, or request number.

Lend

Relais Express 3.2 automatically loads requests from systems that support the DOCLINE, Generic Script, or ISO ILL formats. Library information is linked with the request information. If a library has multiple printers on different floors or in branches, information retrieved from the OPAC determines where the request is sent for scanning and processing. Documents are sent and updated automatically. Version 3.2 has added a variety of features to enhance a scanned document. A calculation is performed for each request and the cover sheet can be used as an invoice. A report writing tool is needed to generate batch invoices or to upload the information to an accounting system. Relais does not record payments.

Borrow

Requests are input by three means: automatic load, staff input, or Web input. Patrons can submit requests through Relais Access Web forms, which are password protected. Patron information from the Relais database is linked with the request information. Requests are searched automatically in Z39.50 compliant catalogs and systems and routed through a queue called RequestFlow, following the parameters set up by the library. It will be forwarded to the appropriate institution, branch, or department and updated. A request may be automatically routed and updated multiple times before completed. RequestFlow can be customized with a

library's own policies and procedures and allows for a high level of flexibility and requires minimal staff intervention.

Features

- Windows-based
- Automatically loads requests from systems that support ISO ILL format
- Communication between Relais and DOCLINE or OCLC is managed through Networker, a product licensed from Pigasus Software, Inc.
- Z39.50 compliant catalogs and systems are searched by keyword, ISSN or ISBN
- Capable of producing routine management reports or staff generated special reports

Cost

Relais Enterprise 3.0 - $20,000 (base price)
Includes: License for up to 10 workstations. This license can be shared by multiple libraries or processing units.

Relais Express 3.2
Various options are available for purchasing Relais Express. They cover everything from software only, with the customer providing all hardware components, to a completely integrated package.

- Option 1. Software only - $995
- Option 2. Complete Software/hardware package - $14,995(Hardware includes Dell Pentium PC, Fujitsu 3096EX scanner with Adrenaline 850v card, cable and IPC-3 option, 21" Monitor, Custom Desk and Foot Pedal. Software - Relais Express license)
- Option 3. Software plus hardware components - software and selected components can be purchased separately. (Fujitsu 309EX Scanner bundle - $6,000; Monitor w/ touchscreen - $3,000, wo/touchscreen - $1,500; Dell Pentium PC - $2,20; Custom Desk - $3,500; Foot Pedal - $200)

Contact

Relais International
1690 Woodward Drive. Suite 215
Ottawa, Ontario,
Canada K2C 3R8
Phone: 888-294-5244 x70 or 613-226-5571 x70
Fax: 613-226-0998
E-mail: info@relais-intl.com
Web: http://www.relais-intl.com/

Relais International is a subsidiary of EBSCO Industries, Inc.

ILL Interfaces:
RLG's ILL Manager V.1.2

Version 1.2 is a new release of RLG's ILL Manager. ILL Manager is designed to support a peer-to-peer system rather than a client-server based system. With peer-to-peer, transactions are managed directly with other ISO ILL compliant and legacy interlibrary loan systems. Those systems include RLIN, DOCLINE, OCLC Illiad, and ARTISO of the British Library. Testing with other systems, including Clio, is still incomplete. ILL Manager can be set up for stand-alone or networked operation.The software also manages non-protocol requests, so that e-mail requests and requests in ALA format can be sent to ILL partners who do not have ISO ILL compliant systems. The software is customizable with options for max cost, expiration dates, loan periods and overdue handling, etc.

Borrow

ILL Manager version 1.2 has a patron Web interface for UNIX and Windows platforms. Patrons can initiate and track the progress of a request. They can manage their own requests with cancellation and renewal options. Automatic, customizable e-mail messages can be sent to patrons during the process.

Requests are automatically routed, and data can be retrieved from all Z39.50 compliant databases such as OCLC's WorldCat or RLG Union Catalog. ILL Manager is fully integrated with Ariel, a product of RLG. The scan function can be started from within ILL Manager and once complete, the request is automatically updated to shipped in ILL Manager. With Ariel version 3.1, documents can be sent directly to the patron.

Lend

Loans can be processed in batches and can be routed to lenders automatically. Messages are displayed regarding status or history of request, reason for unfilled, and shipped. Invoices can be printed or e-mailed as part of the loan. ILL Manager handles complete tracking, searching, and local management of ILL transactions. ILL Manager provides a wide variety of reports and statistics for both borrowing and lending. These include copyright compliance information, performance activity reports, collection development reports, and patron transaction summaries.

Features

- Strong commitment to peer-to-peer operations with other ISO ILL compliant systems
- Non-protocol requests are integrated into ILL Manager for management
- Individual and batch invoices, and financial tracking
- Produces item and mailing labels

Cost

- Level I - Institution/ILL Dept. total transactions (loans & borrows) within 10,000 per year

	Standard	RLG Member Discount
Single copy	$2,500	$2,370
2 - 5 copies	$2,000	$1,900
6 - 10 copies	$1,750	$1,660
Annual fee	$ 350	$ 330

- Level I - Institution/ILL Dept. total transactions (loans & borrows), over 10,000 per year

	Standard	RLG Member Discount
Single copy	$5,000	$4,750
2 - 5 copies	$4,000	$3,800
6 - 10 copies	$3,500	$3,320
Annual fee	$ 600	$ 570

Annual fee: 12 months after the initial software and licensing purchase and each subsequent year. Annual fee covers license renewal, maintenance releases, and technical support.

System Requirements

Stand-alone operation:

Pentium or higher PC, with 300 MHz or faster CPU; Windows NT 4.0, with NT service pack 4 or higher, or Windows 2000; 128 MB RAM; 150 MB disk space for program files, 1 GB disk space for transactions; CD-ROM drive; Internet Explorer 5.0 or higher; Internet access POP3 account; Windows compatible printer; scanner if using Ariel

Networked operation:

Pentium or higher PC with 400 MHz or faster for up to 4 client, 700 MHz or higher if more clients; Windows NT 4.0, with NT service pack 4 or higher, or Windows 2000; 250 MB RAM; 150 MB disk space for program files, 2 GB disk space for transactions; CD-ROM drive

Clients:

Pentium or higher PC with 166 MHz or faster; Windows 95, 98, or NT 4.0 with NT service pack 4 or higher, or Windows 2000; 64 MB RAM; 50 MB disk space for program files; CD-ROM drive

Servers & Clients:

Internet Explorer 5.0 or higher; Internet access with a dedicated POP3 account, and a permanent IP address; Windows compatible printer; scanner if using Ariel

Contact

Research Libraries Group
1200 Villa Street
Mountain View, CA 94041-1100
Phone: 800-537-7546
Fax: 650-964-0943
E-mail: bl.ric@rlg.org
Web: http://www.rlg.org/

The Research Libraries Group is a not-for-profit membership corporation of over 160 universities, national libraries, archives, historical societies, and other institutions. In addition to a range of collaborative activities that address members' shared goals, RLG develops and operates databases and software to serve the information needs of member and nonmember institutions and individuals around the world. In addition to ILL Manager, Ariel is a product of RLG.

The information above was taken from the RLG's Web directory of information/ILL Manager software. Please check the following Web site for updates: http://www.rlg.org/illman/.

Cost Issues

National Maximum Charge

The National Library of Medicine (NLM) has established a national maximum charge of $11.00 per Interlibrary Loan (ILL) request. The $11.00 maximum applies to all Resource and Regional Medical Libraries that utilize the DOCLINE system and charge for requests. The regional charge accessed by the NN/LM SCR Resource Libraries is established by the South Central Academic Medical Libraries (SCAMeL) consortium and cannot exceed the NLM national maximum. The SCAMeL Consortium consists of 14 of the 16 NN/LM SCR Resource Libraries within the region. Currently, the regional maximum charge is $9.00. Primary Access Libraries (PALs) may establish their own fee structure but are encouraged not to exceed the national maximum charge. Libraries are free to establish consortia, reciprocal, and contractual arrangements with any library in the network and provide documents for free or below the national maximum charge.

Exception to NLM Maximum Charge

NLM does not have a national maximum charge for providers of Loansome Doc service. Individual libraries (Resource Libraries and PALs) are free to establish their own fee structure. All libraries should establish their fee structure prior to initiating the service and should provide the client with a copy of their service policy and fee structure. The NN/LM SCR Office has sample copies of contracts available to aid libraries in establishing their Loansome Doc policies.

There is no maximum on surcharges for faxing photocopies, ARIEL transmissions, or for the loan of audiovisuals. This fee may vary from library to library and it is the responsibility of the borrowing library to confirm costs prior to ordering documents. NLM charges an additional fax charge of $3.00 per request.

Maximum Payment for Loans (MAXCOST)

It is important that all cost issues be resolved between the lending and borrowing libraries prior to requesting or filling an Interlibrary Loan (ILL) requests. If a borrowing library has a concern or question about a fee, it should contact the lending library directly to resolve the problem.

Borrowing libraries should always indicate the maximum amount they are willing to pay for an ILL in the MAXCOST field. Libraries that indicate "N/A" or leave the field blank will be responsible for any charges assessed by the lending library.

Lending libraries should retire all requests for costs when their fee exceeds the amount indicated in the MAXCOST field. The lending library will update the request using "CST" (not filled due to cost) code.

DOCLINE automatically retires (stops routing) all requests updated as CST and notifies the borrowing library. A lending library may not charge more than the MAXCOST indicated in the request. Any library charged more for a loan than the amount in the MAXCOST should return the invoice to the lending library along with a copy of the original request. The lending library should credit the borrowing library for any discrepancy between the invoiced fee and the MAXCOST field.

Invoicing AND Electronic Fund Transfer System (EFTS)

All invoicing should be done as quickly as possible. It is important for an invoice to contain enough information to enable the borrowing library to identify the request. Providing a copy of the bibliographic citation would be helpful.

Libraries using the EFTS, which allows for electronic billing of ILLs, will need to establish an account with the University of North Texas, Gibson D. Lewis Library, which serves as the administrator for the South Central Region.

Libraries that charge for loans will upload EFTS data monthly. Accounts are debited and credited causing the electronic redistribution of funds on a monthly basis. Each member library receives a monthly transaction of its account. The EFTS may be used to pay for ILLs from out-of-region libraries. Currently many libraries in Regions 1 and 8 use EFTS billing as well as a few in Region 4. NLM is working on providing a national EFTS system to assist libraries with the billing/invoice issue. You may identify out-of-region EFTS participants by going to the NN/LM New England Region (see webliography) web site and check via LIBID/SERHOLD code. Also, EFTS participation information is available through DOCUSER by using the Library Group Code - Electronic Fund Transfer System.

If there is a dispute regarding an EFTS charge the borrowing library should contact the lending library to resolve the issue. Libraries utilizing the EFTS may submit credits to correct billing errors, which will appear on the borrowing libraries next statement.

Double Fills

All requests should be updated promptly and properly. The lending library must remember the DOCLINE and OCLC time-triggered functions. Double fills will result when the lending library fails to update the status of the request within the allowed time period for processing the incoming requests. When updating the status of a request is delayed and it routes to another library, that library may fill the request, which causes a double fill. The borrowing library should contact the first library and make them aware of the situation. The first lending library should waive the ILL fee. The second lending library should be paid for the loan, if a fee was accessed.

Webliography for Cost Issues

Electronic Fund Transfer System (EFTS) Overview. SCAMeL.
http://library.hsc.unt.edu/scamel/efts/overview.html

EFTS Resources (Forms, Members, Policies). SCAMeL.
http://library.hsc.unt.edu/scamel/efts/

EFTS Deposit Form. SCAMeL.
http://library.hsc.unt.edu/scamel/efts/depform.html

EFTS Account Information Form. SCAMeL.
http://library.hsc.unt.edu/scamel/efts/acctinfo.html

EFTS. University of Conneticutt Health Science Library.
http://nnlmner.uchc.edu/efts/

DOCLINE Time-Triggered Actions. NLM.
http://www.nlm.nih.gov/docline/docline_manual/requests/time.html

OCLC Interlibrary Loan Tutorial. OCLC.
http://www.oclc.org/oclc/usingill/gettingstarted/frameset.htm

Consortia

Library consortia are cooperative alliances of libraries formed to better serve their clients. The main mission of most library consortia is resource sharing. The current trend is the formation consortia for the express purpose of electronic resource sharing, but the traditional agreements to supply free or reciprocal interlibrary loan services and to avoid collection duplication remain intact. The free ILLs and access to other libraries' journal collection can assist in reducing costs. In addition, most consortia offer educational opportunities and allow for the exchange of ideas between peers.

The Health Science Library Consortia in the NN/LM SCR can be found at: http://nnlm.gov/scr/outrch/consortia.htm

Library Groups

The DOCLINE system uses Library Groups. Library Groups are 11 or more related libraries that cannot be identified in any other way. For example, an entire state cannot be a Library Group but all of the PALs in a state may become a group. Often, but not necessarily, these groups are formal consortia that have Interlibrary Loan agreements in place. DOCLINE includes them in the system so libraries in the group can easily access other libraries in the group, especially to determine SERHOLD holdings.

The Library Groups only available to libraries in the NN/LM SCR are:

APALS - PALS in Arkansas
GOAL - Greater Oklahoma City Area Health Sciences Library Consortium
HEALTHLINE - Health Libraries Information Network
HOLSA - Health Oriented Libraries of San Antonio
SCAMeL - South Central Academic Medical Libraries

In addition to these regional groups, there is a nationwide group of over 700 medical libraries whose sole purpose is to provide free interlibrary loan service to each other. This group, called FreeShare, began in 2000. More information is available at http://nnlm.gov/libinfo/docline/freeshare.html.

Copyright

Article I, Section 8 of the Constitution of the United States sets forth the basic groundwork of American copyright law by declaring that Congress has the power "to promote the progress of science and useful arts, by securing for limited times to authors and inventors the exclusive right to their respective writings and discoveries." For over 200 years, balance has been sought between the rights of producers to control the use of their products and the public's interest in the fair use of such products for the betterment of society. The purpose of this section is to provide a brief introduction to the elements of this balance and discuss some of the particular Copyright Act statutes most relevant to Interlibrary Loan activities. No legal advice is intended. Please consult the excellent copyright Web sites noted at the end of this section for more detailed information.

The formal copyright law of the United States is set forth in Title 17 of the United States Code. This law gives the author of an original work exclusive rights to reproduce the work, to prepare derivative works, and to perform and display the work publicly. With the enactment of the Copyright Term Extension Act (aka the Sonny Bono Copyright Term Extension Act) in 1998, the term of protection for copyrighted works created after January 1, 1978 is for the author's life plus 70 years.

As previously mentioned, the rights of creators are balanced against the goal of providing for an informed citizenry and the advancement of the arts and sciences. While all the provisions of copyright law support the balance between producers and consumers of information, perhaps the main weight on the consumer's side is the concept of "fair use." Section 107 of the U.S. Copyright Act states that users are allowed fair use of copyrighted works for purposes such as criticism, comment, news reporting, teaching, scholarship or research.

Of course, the long-standing question with regard to fair use is, "How much use is fair use?" In order to determine if a particular use falls under guidelines, the law instructs us to consider four factors. The factors are:

- The purpose and character of the use, including whether it is for commercial or non-profit educational purposes;
- The nature of the copyrighted work;
- The amount and substantiality of the portion used as it relates to the work as a whole; and
- The effect of the use upon the potential market for or value of the copyrighted work.

In fact, these are four very subjective factors, open to interpretation. The application of "fair use" depends on the particular facts of the individual situation. Neither case law nor statutory law provides clear guidance on which uses are fair and which are not.

Section 108 of the Copyright Act discusses reproduction by libraries and archives. According to Section 108, a library or its employees acting within the scope of their employment may reproduce one copy of a work and distribute if:

1. the reproduction or distribution is made without any purpose of direct or indirect commercial advantage;

2. the collections of the library are open to the public or available not only to researchers affiliated with the library or with the institution of which it is a part, but also to other persons doing research in a specialized field; and

3. the reproduction or distribution of the work includes a notice of copyright that appears on the copy that is reproduced or includes a legend stating that the work may be protected by copyright if no such notice appears on the work.

Section 108 also states that the rights of reproduction and distribution apply if the user requests no more than one article or other contribution to a collective work or periodical issue from the library where the user makes the request or from that of another library if:

1. The copy becomes the property of the user and the library has no notice that the copy would be used for any purpose other than private study, scholarship or research. (The library may not retain a scanned or print copy for reuse without permission. The library may not fax a copy and then mail the copy.)

2. The library displays prominently at the place where orders are accepted and on its order forms, a warning of copyright in accordance with the Register of Copyrights regulation.

A final proviso of Section 108 allows libraries to participate in interlibrary agreements that do not have as their purpose or effect receiving copies in such aggregate quantities as to substitute for the subscription to or purchase of a work. If a request exceeds the generally accepted guidelines, the borrower is responsible for paying copyright royalties through the Copyright Clearance Center or the publisher.

The increasing use of electronic journals, particularly by university libraries, is having an impact on interlibrary loan. These journals are purchased with licensing agreements which supersede copyright law and which usually prohibit making the journal's contents available outside the library premises, effectively blocking interlibrary loan. This restriction primarily affects smaller libraries, which depend on access to university journal collections. Although MLA has expressed concern that these contracts limit uses traditionally permitted under copyright law, the Digital Millennium Copyright Act of 1998 upholds the right of software vendors to impose restrictions on use.

Most librarians are aware that copyright in the United States is experiencing growing pains as technology strains the bounds of the law. The recent convergence of technology, networks, and social structure in the form of the World Wide Web created an environment in which people can easily make and distribute high quality digital copies of entire copyrighted works. Software vendors and publishers are responding to this new environment by placing an increased

emphasis on licensing and laws that can strengthen license provisions. Interlibrary loan librarians must be alert to this changing element in their work environment.

Additional information is available on the Web sites noted below.

Coalition for Networked Information. ARL/EDUCAUSE.
http://www.cni.org/docs/info.policies/CONTU.html

U.S. Copyright Office. Library of Congress.
http://lcweb.loc.gov/copyright/

Copyright Home Page. University of North Texas Libraries.
http://www.library.unt.edu/copyright/default.htm

Copyright Crash Course. University of Texas System, Office of the General Consul.
http://www.utsystem.edu/ogc/intellectualproperty/cprtindx.htm

Copyright and Fair Use. Stanford University Libraries.
http://fairuse.stanford.edu/

The Copyright Website.
http://www.benedict.com/

Copyright Clearance Center.
http://www.copyright.com/

MLA's Comments on the Digital Millenium Copyright Act.
http://mlanet.org/government/dmca/dmcacomments.html

APPENDIX
CONTU Guidelines on Photocopying Under Interlibrary Loan Arrangements

The CONTU Guidelines were developed by the National Commission on New Technological Uses of Copyright Works to assist librarians and copyright holders in understanding the amount of photocopying for use in interlibrary loan arrangements permitted under the copyright law. CONTU provides guidance in the application of section 108 to the most common interlibrary loan case - a library obtaining from another library copies of articles from issues of periodicals published within the last five years. The Guidelines do not address copies made from articles in issues of periodicals older than five years.

Guidelines for the Proviso of Subsection 108(g)(2)

1. As used in the proviso of subsection 108(g)(2), the words "...such aggregate quantities as to substitute for a subscription to or purchase of such work" shall mean: (a) with respect to any given periodical (as opposed to any given issue of a periodical), filled requests of a library or archives (a "requesting entity") within any calendar year for a

total of six or more copies of an article or articles published in such periodical within five years prior to the date of the request. These guidelines specifically shall not apply, directly or indirectly to any request of a requesting entity for a copy or copies of an article or articles published in any issue of a periodical, the publication date of which is more than five years prior to the date when the request is made. These guidelines do not define the meaning, with respect to such a request, of "...such aggregate quantities as to substitute for a subscription to [such periodical]." (b) with respect to any other material described in subsection 108(d), including fiction and poetry, filled requests of a requesting entity within any calendar year for a total of six or more copies or phonorecords of or from any given work (including a collective work) during the entire period when such material shall be protected by copyright.

2. In the event that a requesting entity: (a) shall have in force or shall have entered an order for a subscription to a periodical, or (b) has within its collection, or shall have entered an order for, a copy of a phonorecord of any other copyrighted work, materials from either category of which it desires to obtain by copy from another library or archives (the "supplying entity"), because the material to be copied is not reasonably available for use by the requesting entity itself, then the fulfillment of such request shall be treated as though the requesting entity made such copy from its own collection. A library or archive may request a copy or phonorecord from a supplying entity only under those circumstances where the requesting entity would have been able, under the other provisos of section 108, to supply such copy from materials in its own collection.

3. No request for a copy or phonorecord of any materials to which these guidelines apply may be fulfilled by the supplying entity unless such request is accompanied by a representation by the requesting entity that the request was made in conformity with these guidelines.

4. The requesting entity shall maintain records of all requests made by it for copies or phonorecords of any materials to which these guidelines apply and shall maintain records of the fulfillment of such requests, which records shall be retained until the end of the third complete calendar year after the end of the calendar year in which the respective requests shall have been made.

Electronic Interlibrary Loan

Ariel® for Windows®
Webliography

Ariel is a document delivery software that transmits and receives requests over the Internet using FTP (file transfer protocol) and MIME (multipurpose Internet mail extensions) e-mail standards. It scans and sends grayscale and color images (ARIEL 3.01). Ariel is available from the Research Libraries Group, Inc. and their distributors. The software is available in two versions. The "full" copy of the software provides scanning, sending, receiving, forwarding and printing of documents. The "receive" copy provides only receiving, forwarding, and printing. The Ariel workstation for use with the "full" copy of the software will require a scanner, computer, and printer. The "receive" copy will need the same equipment with the exception of the scanner. There are several recommended scanners, of various price ranges, that are compatible with Ariel. **It is strongly recommended that only scanners listed as "RLG-supported" be purchased for an Ariel workstation.** Please refer to the Webliography for links to Equipment Requirements, Distributors, and other relevant information.

DocView
Webliography

DocView is a software program developed by the National Library of Medicine (NLM) that allows the transmission of documents through the Internet. DocView can operate under Windows 3.1, Windows for Workgroups, Windows 95 and Windows NT. It provides Ariel-compatible communications, recognizes Ariel documents, and allows image viewing, manipulation and printing after document reception. To receive a document, the DocView user may contact a library or document supplier through a built-in document ordering function, or through conventional methods such as e-mail, telephone, fax, or other electronic means, and ask for a specific request to be sent directly to their computer. DocView can receive documents either directly or indirectly using the Ariel system, e-mail, or the World Wide Web. It offers a number of features for using the document, including electronic bookmarks, zoom and shrink, rotation and document management. The equipment requirements are minimal but a direct connection is recommended for users who wish to receive Ariel FTP documents, since their Internet Protocol (IP) addresses usually do not change. A faster computer and additional memory would enhance the performance but it can run on the minimum specifications. DocView is freely available and may be downloaded from the DocView Home Page. Please refer to the Webliography for links to Equipment Requirements, Distributor, and other relevant information.

DocMorph Server
Webliography

DocMorph Server is an experimental prototype Web server for processing library information through the World Wide Web, which was developed by the Communication Engineering Branch of the National Library of Medicine's Lister Hill National Center for Biomedical

Communications. The server allows users to upload scanned image files for conversion to alternative formats. By using a Web browser, files can be uploaded to the server for conversion, and it usually takes less than one minute before they are ready for use. The server does not change the original file on the user's hard disk; it only delivers a converted file. The DocMorph Server is especially useful for Ariel users. It allow the conversion of TIFF (Tagged Image File Format) images to PDF (Portable Document Format) for use with the Adobe Acrobat Reader, split multipage TIFF files into separate pages, uses optical character recognition (OCR) to convert Ariel or TIFF images to text, and more. An enhancement of DocMorph is the new Reading Room. This enhancement provides the visually challenged with a simple interface that enables the user's computer to read the material out loud. This is also helpful to those that may not read English, but who are able to understand the spoken word. Use of the OCR and file conversion may be done using practically any computer with a browser (Netscape 3.0 or higher; Microsoft Internet Explorer, version 4.0 or higher). Macintosh users should use Navigator. The Reading Room is platform specific and must be done on a computer running Windows 2000/NT/98/95. The computer will need a soundboard, with either speakers or earphones. The browser must be Internet Explorer 5. A link is provided to download a speech engine to install on the computer the first time you use the speech synthesizer. Use of the DocMorph server is free but does require user registration. Please refer to the Webliography for links to Registration, Server, Speech Software, and other relevant information.

Prospero
Webiography

Prospero is a Web-based document delivery system designed to complement the Ariel software system. It contains a staff module and a server-side module. The staff module runs on any Windows XP, 2000/NT/98/95. It converts Ariel TIFF files to PDF files and allows the importing of existing TIFF files and the direct scanning of new documents. The PDFs are posted on a secure Web server. The staff module also manages user information and generates e-mail to the patron. The server-side module provides the user interface, which allows users to retrieve their documents using any Web browser. The mounting of documents to the server helps users deal with firewalls and e-mail limitations. The software automatically generates a patron Personal Identification Number (PIN) and authenticates via e-mail address and PIN number for secure access. It allows customizable e-mail messages. Prospero can restrict the number of views or the number of days on the system to comply with copyright. The use of the Web browser interface allows access from anywhere. Documents may also be delivered through Prospero as an e-mail attachment. The document may be saved and/or printed as in the server mounted delivery method. This method saves the recipient the trouble of going to the Web server to download the document, and the institution doesn't have to maintain server space for documents. However, the institution has no control over the document since there is no way to place time or viewing restrictions on the document. It does allow you to include a customized copyright page. Prospero has a free license and may be modified by the user. A disadvantage of being open source is that it requires local support from a system's department. Another disadvantage that should be noted is PDF documents are slow to load and incompatibilities have been reported with some browsers such as

America Online (AOL). Please refer to the Webliography for Download Instructions, and other relevant information.

Webliography

Ariel Information (RLG)

       Resource Libraries Group, Inc. Home Page.
       http://www.rlg.org/toc.html#toc
       Ariel Home Page.
       http://www.rlg.org/ariel/index.html
       Buying (Licensing) Ariel form RLG.
       http://www.rlg.org/ariel/ariprice.html
       Distributors.
       http://www.rlg.org/ariel/arieldist.html
       Exchanging Information with the Arie-L Group.
       http://www.rlg.org/ariel/arie-l.html
       Equipment Requirements.
       http://www.rlg.org/ariel/arireq.html
       Recommended Scanners.
       http://www.rlg.org/ariel/ariscan.html

DocView Information (NLM)

       DocView Home Page.
       http://docmorph.nlm.nih.gov/docview/
       Fact Sheet.
       http://docmorph.nlm.nih.gov/docview/factsht.htm
       Equipment Requirements.
       http://docmorph.nlm.nih.gov/docview/docview6.htm
       Distributor (free).
       http://docmorph.nlm.nih.gov/docview/distrib/form.htm
       User Manual.
       http://docmorph.nlm.nih.gov/docview/distrib/0.htm
       Listserv.
       http://docmorph.nlm.nih.gov/docview/distrib/14.htm

DocMorph Information (NLM)

       DocMorph Server Home Page.
       http://DocMorph.nlm.nih.gov/docmorph/default.htm
       News.
       http://DocMorph.nlm.nih.gov/docmorph/AccessibleNews.htm
       FAQs.
       http://DocMorph.nlm.nih.gov/docmorph/AccessibleFAQ.htm

User Registration.
http://DocMorph.nlm.nih.gov/docmorph/ApplyCheckA.asp
Download Speech Software.
http://DocMorph.nlm.nih.gov/docmorph/AccessibleDownload.htm

Prospero Information (Ohio State University)

Prospero Home Page.
http://bones.med.ohio-state.edu/prospero/
Download Instructions.
http://bones.med.ohio-state.edu/prospero/current.html
Awards, Publications, Presentations.
http://bones.med.ohio-state.edu/prospero/pubs.html

Color Issues

Policy

The delivery of documents in color is a special circumstance. In many cases color document delivery requires special handling by the lender. Therefore, some lenders might charge more for color documents than for black and white. In that case, the borrower must be willing to accept the additional charge for color. The borrowing library should determine whether a lender has color capability before directing a request for a color document to that lender. The borrowing library must also determine which forms of delivery are acceptable to the patron and communicate this information to the lending library. Due to the size of the files, lending libraries should not routinely FTP color documents unless requested to do so by the borrowing library.

Producing Color Documents

There are three methods for producing color documents:

- Copy on a color copier
- Scan with a color-capable scanner and print on a color printer
- Download a document posted on a web server and print on a color printer

Delivery Options

Color documents may be delivered via one of the following methods:

- Mail delivery
- Electronic delivery Posting on a web server, as with the Ariel, Prospero, or OCLC ILLiad systems
- FTP as a TIFF file (not recommended due to the large size of the files)
- Mime E-mail as a PDF file

Procedural Issues

In trying to determine how requests for color documents may be filled by electronic methods, several questions must be answered at the individual institution.

- Borrowers
  - Do patrons have access to a color printer?
  - Is the interlibrary loan department capable of receiving color files electronically?
  - Is the necessary software in place?
  - Will color files require too much memory for the hardware?
  - Are color files too large for the e-mail server to handle?

- Lenders
  - Might the institution own a color-capable scanner, but it is not the one normally used for electronic delivery?
  - How disruptive to the workflow would using an alternate scanner for color documents become?

OCLC Requests

- Borrowers - add a borrowing note if color is required.
- Lenders - reply with a condition. Example: Condition:"Is mail delivery acceptable?"

  If color was requested, but the article did not contain any color images, a note may be attached to the article stating, "The original document does not contain any color images."

  In addition, if an extra fee is charged for color, the lending library's NAD record should be updated to reflect this policy.

DOCLINE Requests

- Borrowers - specify the delivery method and state that color is required in the comments area. Examples: "Prefer color" or "Please refer if cannot supply color".
- Lenders - If color was requested, but the article did not contain any color images, a note may be attached to the article stating, "The original document does not contain any color images."

Interlibrary Loan Plan
National Network of Libraries of Medicine

Goal

To provide health professionals with timely access to and delivery of information through the effective utilization of the nation's health science library collections.

Objectives

- Develop efficient and cost effective processes for requesting, referring and delivering items.
- Develop and coordinate gathering and reporting of serial holdings data.
- Provide standardized policies and procedures to assure appropriate regional consistency within the national network.
- Investigate and test methods of interlibrary lending.
- Develop interfaces with other interlibrary loan networks.

The Network

Libraries in the United States with collections in the health sciences may be included in the National Network of Libraries in Medicine. As participating institutions, libraries accept the goals and objectives of the NN/LM Interlibrary Loan Plan.

Network institutions are divided into four categories based on ability and willingness to assume responsibility for interlibrary lending of materials.

1. National Library of Medicine

NLM's responsibilities include national coordination and interface with other national interlibrary loan networks, provision of interlibrary loan services (for print or non-print materials) to augment regional resources; the collection distribution of management data to monitor network performance; and the continued development and support of DOCLINE.

2. Regional Medical Libraries (RMLs)

Each RML will be responsible for developing and implementing a regional interlibrary loan policy, including the selection of resource libraries, consistent with the national network policy, coordinating the collection and maintenance of regional locator data, and managing the reproduction and distribution of regional and subregional locator tools. RMLs also assist in the interpretation of data and the fostering of cooperation in activities relating to collection development and collection maintenance, coordination of DOCLINE activities within its region, interfacing with other interlibrary loan networks, and participating in exploring improved methods of interlibrary lending.

3. Resource Libraries

In this category are libraries with sufficient collections and current acquisitions, selected by the RML, to provide interlibrary lending service including referrals, in accordance with network policies and procedures, primarily to a specific subregional area or a larger geographic area as a specialized resource. Resource libraries must contribute and maintain holdings data in SERHOLD and participate in DOCLINE, and in other regional programs.

4. Primary Access Libraries

This category, which includes hospital libraries, academic health science libraries and other network participants which do not serve as resource libraries, normally represents the health professional's first point of access into the network. PALs should contribute to and maintain holdings data in SERHOLD and participate in DOCLINE. These libraries are encouraged to develop adequate resources to respond to their users' needs and to cooperate with other Primary Access Libraries to share resources among themselves before forwarding non-available requests to appropriate Resource Libraries.

Interlibrary Loan Service

Health professionals are expected to access the network through use of the nearest network library with which they are affiliated. Non-affiliated health professionals will be "connected" (assigned) to a health science library by the RML, or be serviced by the RML itself. All libraries in the network are expected to process requests from other institutions to the extent they are able.

Via DOCLINE

- DOCLINE is the preferred interlibrary loan system in the NN/LM.
- Network libraries must report holdings in SERHOLD to become a full DOCLINE participant.
- Network libraries participating in DOCLINE are expected to maintain routing tables that accurately reflect interlibrary loan borrowing patterns and that are consistent with regional interlibrary loan policies.
- DOCLINE participants are expected to be lenders as well as borrowers.
- DOCLINE participants are expected to log on once a day and update their requests with action taken.
- The National Library of Medicine will distribute reports from the DOCLINE system to all DOCLINE participants.

Non-DOCLINE Requests

- Network libraries shall make optimum use of local resources before forwarding non-available requests to appropriate Resource Libraries.
- Network libraries are expected to use available regional locator tools to determine the nearest library that holds the item desired and to send the request to that library. The

NN/LM Interlibrary Loan Plan will provide for processing and delivery of items that are not listed in available tools for which no regional locator tools exist, or for libraries which do not use available locator tools.

Requesting patterns

- Item Held at Nearest Resource Library
  A network library that determines that the desired item is available at its nearest Resource Library submits the request to this library. A filled loan is subject to a charge that shall not exceed the national maximum.

- Item Held in Region, but not at Nearest Resource Library
  A network library that determines that the desired item is not available at its nearest Resource Library, but is held at another Resource Library or RML in its region can submit the request directly to the library holding the item. Such a filled request is subject to a charge that shall not exceed the national maximum.

- Item Not Held By a Regional or Resource Libraries
  Interlibrary loan requests which cannot be filled within a region may be sent by any NN/LM library to either NLM or to any Resource Library (RMLs are considered Resource Libraries) in the nation, directly. All applicable regional interlibrary loan policies and procedures remain unchanged.

- Item Held at the Resource Library or RML, but Not Filled
  Any RML or Resource Library that cannot fill a request shall refer it, based on locator tool information, to another Resource Library in the region, RML or NLM. No referral charge shall be levied if the original request was sent to the RML or Resource Library based on locator tool information. The library filling the request, including NLM, may charge for providing the loan. Unless it is indicated on the request form that a desired item is unavailable in the region, NLM will reject requests not referred by a Resource Library or RML.

Filled loans or notices of non-fulfillment are to be sent directly to the originating library. This library will ensure that the user receives the loan or is notified of the disposition of the request.

Charges

There shall be a standard maximum charge for requests filled for network libraries. This charge will be set by NLM using data supplied by RMLs and Resource Libraries based on direct costs for filled requests. Biennial surveys shall determine the need for any change in the maximum charge. The established charge should enable the network libraries to recover direct costs incurred and provide the service at a minimum cost to the user. An institution that fills the request may choose not to pass on the entire charge to the user. No separate charge shall be made for processing referrals or other non-available items in those cases where a locator tool was used. Lending charges for audiovisual materials are not subject to the network maximum,

but RMLs may wish to establish a recommended regional maximum charge after consultation with Resource Libraries in the region.

A network library which does not indicate on a non-DOCLINE request that a regional locator tool has been checked before sending the request, can be levied a surcharge for handling if the library processing the request must refer it on to another library. This surcharge shall be established as part of the RML's regional plan.

Performance Data

Rationale
> The basic objective of the collection and submission of performance data is to provide NLM management and the RMLs with data needed to assist in developing and implementing programs and services in a cost effective manner. This data enables the evaluation of existing performance and determination of trends and future needs. The data should also assist RMLs in programs of collection development, maintenance and preservation. All performance data will be obtained from DOCLINE statistics and from statistics reported in the Annual Survey of Medical School Libraries in the United States and Canada. No separate reports are required.

Fulfillment Standards
> The measure of fulfillment (fill rate) is calculated by dividing the number of received requests into the number of filled requests. An acceptable minimum level of performance for an RML or Resource Library shall be a 75% fill rate.

Throughput Standard
> Network standards require that processing of 85% of filled loans be completed within four calendar days and that 85% of the non-available requests be processed within seven calendar days.

Notification of Non-availability
> RML and Resource Libraries will indicate reasons for not filling document delivery requests by including this information as specifically as possible (e.g., issue not owned, missing, etc.) in the "Remarks" portion of the interlibrary loan request form for non-DOCLINE requests and via the "Loan" module for DOCLINE requests.

Regional Document Delivery Plan
National Network of Libraries of Medicine
South Central Region

INTRODUCTION

This plan for the South Central Region (SCR) of the National Network of Libraries of Medicine (NN/LM) is based on the National Interlibrary Loan Plan as published by the National Library of Medicine (NLM). The Plan includes additional elements that are specific to and meet the needs of the South Central Region. Libraries affected by this Plan should also be familiar with national and regional policies as described in the NN/LM SCR Document Delivery Manual, Copyright Law of the United States, and the National Interlibrary Loan Code of the American Library Association. This plan is approved by the NN/LM SCR Board and its subcommittee, the NN/LM SCR Document Delivery Committee.

MISSION

Members of the National Network of Libraries of Medicine, South Central Region will provide efficient, cost effective document delivery services ensuring that health professionals and/or consumers throughout the region have timely access to information from health sciences and consumer health libraries. For consistent high quality document delivery, network libraries will follow standardized national and regional policies and procedures.

NETWORK DESCRIPTION

Any library, information center, institution or organization in the SCR with its own collection of health sciences materials from which, in part, it provides information services to health professionals and/or consumers, can become a network participant. As participating institutions, libraries accept the goals, principles, policies and procedures of the SCR. Network institutions are divided into the following categories based on ability and willingness to assume responsibility for interlibrary lending and document delivery of materials:

- **PRIMARY ACCESS LIBRARIES (PALs)**
  Full members: hospital libraries, academic health science libraries and other network participants that do not serve as Resource Libraries and which normally represent the health professional's and/or consumer's first point of access into the network. PALs must contribute to and maintain holdings data in SERHOLD and participate in DOCLINE. These libraries are encouraged to develop adequate resources to respond to their users' needs and to cooperate with other PALs by sharing resources among themselves, locally, before forwarding non-available requests to appropriate Resource Libraries.
  Affiliate members: libraries or information/resource centers that are called on for health information by its users, but which do not meet all of the criteria for Full member

participation. An Affiliate member might form a cooperative relationship with a Full member, for example, for reference assistance or document delivery.

- **RESOURCE LIBRARIES (RLs)**
  There are currently 15 libraries which have been selected by and are under contract with the NN/LM SCR. RLs have sufficient collections and current acquisitions to provide document delivery service, including referrals, in accordance with SCR policies and procedures. Resource Libraries must contribute to and maintain serial holdings data in SERHOLD, participate in DOCLINE and in other regional programs. Each RL has a subregion in which it concentrates its services.

- **REGIONAL MEDICAL LIBRARY (RML)**
  The Houston Academy of Medicine-Texas Medical Center Library serves as the Regional Medical Library in Region 5. The RML is also considered a Resource Library. Its collection and services serve as a back up for all network libraries in the South Central Region.

- **NATIONAL NETWORK OF LIBRARIES OF MEDICINE, SOUTH CENTRAL REGIONAL OFFICE (NN/LM SCR)**
  While this office does not provide document delivery services, it is responsible for developing and implementing a regional document delivery plan, which is consistent with the national plan. The NN/LM SCR Office coordinates all DOCLINE activities within the region, refers callers to appropriate Loansome Doc participants, interfaces with other document delivery networks, participates in exploring improved methods of document delivery, and manages the collection, analysis, distribution and interpretation of regional document delivery performance data of all DOCLINE participants.

- **NATIONAL LIBRARY OF MEDICINE (NLM)**
  NLM's responsibilities include national coordination and interface with other national document delivery networks; provision of document delivery services for print and non-print materials to augment regional resources; collection and distribution of management data to monitor network performance; and development and support of DOCLINE, NLM's document delivery system.

DOCUMENT DELIVERY

Document delivery includes, but is not limited to, the following: interlibrary loan, intralibrary loan, photocopy, fax, and desktop services.

DOCLINE is the preferred document delivery system in Region 5; however, other means and systems may be used, as long as provisions of the US Copyright Law are observed. Libraries that are DOCLINE participants must contribute their serial holdings to SERHOLD, unless the library has less than 25 current health sciences titles in its collection. NN/LM libraries are expected to first use libraries that are in geographical proximity, then Resource Libraries, followed by the RML and NLM, and finally out of region Resource Libraries when using DOCLINE or ALA Interlibrary Loan forms. Each DOCLINE library is expected to set up routing

tables consistent with appropriate requesting patterns as described in this plan. The Regional Medical Library must be included in the DOCLINE Routing Tables, preferably in the second to last cell. DOCLINE participants, except for part-time staffed PALs, are expected to log on to DOCLINE every day in order to facilitate the flow of requests on the system.

REQUESTING PATTERNS

Network libraries that are not DOCLINE libraries are expected to use available regional locator tools to determine a local network library that holds the item desired and to send the request to that library. Both DOCLINE and non-DOCLINE network libraries shall make optimum use of local resources before forwarding non-available requests to appropriate Resource Libraries. The following describes the appropriate requesting patterns when local resources have been exhausted:

- **ITEM HELD AT NEAREST RESOURCE LIBRARY**
  A network library, which determines that the desired item is available at its nearest local library, submits the request to this library. A filled loan is subject to a charge that shall not exceed the national maximum. The current network maximum charge for filling an interlibrary loan request is set at $9.00. The RL may impose additional charges for those requests labeled RUSH and for FAX requests and on requests for audiovisuals, as well as for requests received from libraries outside of Region 5.

- **ITEM HELD IN REGION BUT NOT AT NEAREST RESOURCE LIBRARY**
  A network library which determines that the desired item is not available at its nearest Resource Library but is held at another Resource Library or the RML in its region can submit the request directly to the library holding the item. Such a filled request is subject to a charge that shall not exceed the national maximum. Current national maximum is $11.00.

- **ITEM NOT HELD AT RESOURCE OR REGIONAL MEDICAL LIBRARY**
  Requests which cannot be filled within a region may be sent by any NN/LM library directly to either NLM or to any Resource Library in the nation. Out-of-region libraries may be placed at the back of a DOCLINE library's routing tables. Non-DOCLINE requests must indicate that the item is not available in Region 5 on the request form. All applicable regional interlibrary loan policies and procedures remain unchanged.

- **ITEM HELD AT THE RESOURCE LIBRARY OR RML BUT NOT FILLED**
  Any RL or RML that cannot fill a request for non-DOCLINE libraries shall refer it, based on locator tool information, to another RL in the region, to the RML, or to NLM. No referral charge shall be levied if the original request was sent to the Resource Library or RML based on locator tool information. The library filling the request, including NLM, may charge for providing the loan. Unless it is indicated on the request form that a desired item is unavailable in the region, NLM will reject requests not referred by a Resource Library or RML.

Filled loans or notices of non-fulfillment are to be sent directly to the originating library. This library will ensure that the user receives the loan or is notified of the disposition of the request.

Electronic Fund Transfer System (EFTS) is considered an acceptable method of payment for document delivery within the South Central Region. The rates are governed by the South Central Academic Medical Libraries (SCAMeL) consortium. All EFTS activities are coordinated through University of North Texas Health Science Center Library.

PERFORMANCE DATA

The basic objective of the analysis of performance data is to provide the NN/LM SCR office with data needed to assist in developing and implementing programs and services. This data supplies information for the evaluation of current performance and determination of trends and future needs. The data also assists the NN/LM SCR office with programs in collection development, maintenance, and preservation. Statistical data should be used by individual libraries to monitor the quality of their participation in the network and assist in collection development. NLM's DOCLINE statistical reports will be used to monitor and analyze performance data for the PALs, RLs, and the RML. No separate reports are required. Requests not filled due to cost will be excluded in this evaluation.

A library's fill rate is calculated by dividing the number of received requests into the number of filled requests, minus those rejected due to cost. The minimum acceptable fill rate for Resource Libraries is 75%.

Network standards require that 85% of filled and non-filled loans be processed completely within three working days. Clinical emergencies are exempt from the 85% requirement; however, these types of requests will be processed immediately by the lending library. Requests for clinical emergencies that are entered onto DOCLINE are to be followed by a phone call to the lending library.

NN/LM SCR GOALS

- Define and describe the roles and responsibilities of regional participants in the national network, including the Regional Medical Library, Resource Libraries, and Primary Access Libraries, and publish in the NN/LM SCR Document Delivery Manual, Network News and in other publications on an as needed basis.
- Educate regional network members concerning the roles and responsibilities of network participants by publishing in the NN/LM SCR Document Delivery Manual and Network News. Train members at regional and local meetings and on an as needed basis, provide telephone support, assess educational needs, and present updates at the annual meeting of the South Central Chapter of the Medical Library Association.
- Coordinate all regional DOCLINE activities, including assisting new libraries with implementation, providing support for existing DOCLINE libraries, and providing mechanisms for exchanging ideas and information between member libraries and NLM. Cooperate with SCAMeL and NLM in maintenance serials holding data in SERHOLD.

- Promote participation in the NN/LM SCR. Encourage network members to identify and refer potential members and provide information to referrals and requesting libraries.
- Encourage and recognize service excellence in the region by investigating incentives to improve and streamline current policies.
- Promote access to the network via Loansome Doc by maintaining current profiles on libraries willing to serve Loansome Doc participants, referring Loansome Docs to libraries willing to serve them, and sending information on Loansome Doc to potential users. Train librarians via workshop to participate in and promote Loansome Doc.
- Cooperate with the National Library of Medicine and SCAMeL in the implementation, testing and interfacing of new technologies to improve document delivery in the South Central Region.

Appendix

List of Resource Libraries in NN/LM:
> http://nnlm.gov/members/reports/?nn=100

List of Resource Libraries in NN/LM SCR:
> http://nnlm.gov/members/reports/?region=05&nn=100